

ATTACHMENT IV
Timeline of City Staff's Interaction with Cisco

<u>Date</u>	<u>Event</u>
January 21 - 22, 2003	<p>E-mail from the IT Network Operations Manager to a DVBE TECH Account Manager, an IT Information Systems Analyst, a Cisco Major Account Manager, a Cisco Systems Engineer, an IT Supervising Applications Analyst, and a former Deputy CIO which requested an itemization of networking equipment for the new Civic Center. Included in the message is a list of 11 hardware and software items (some specifically referred to as Cisco products). The IT Network Operations Manager asked that list pricing be incorporated as well as any add-ons (modules, port adapters, etc.) where required. This was an effort to get item pricing which could then be used to develop an overall cost estimate. The DVBE TECH Account Manager responded to the IT Network Operations Manager's request that he would review the configurations with the Cisco Major Account Manager and a Cisco Systems Engineer to confirm them. He indicated that the configurations may be a bit overdone to be on the safe side but they could be fine tuned in the days to come. The DVBE TECH Account Manager responded to the IT Network Operations Manager, the Former Deputy CIO, an IT Supervising Applications Analyst, an IT Information Systems Analyst, a Cisco Major Account Manager, and a Cisco Systems Engineer indicating the suggestions from the Cisco Systems Engineer had been incorporated into the configuration and that the team should meet to discuss the specifications. The IT Network Operations Manager responded to the DVBE TECH Account Manager, a Cisco Systems Engineer, a Cisco Major Account Manager, the former Deputy CIO, an IT Information Systems Analyst, and an IT Supervising Applications Analyst stating that the quote requested was only for budgetary purposes. "It does not signify an intent to procure any of the items listed on the quote; nor does it signify an intent to procure any Cisco equipment."</p>
April 28 - 30, 2003	<p>E-mail message from a Regional Sales Manager for Foundry Networks regarding a quote for the network equipment at the new Civic Center. The Regional Sales Manager stated that "Foundry can provide you with a very competitive and affordable alternative to Cisco. I have attached a quote for the Foundry products that match your network requirements regarding the Cisco 65xx in the core and the closet Cisco 35xx and 45xx switches." Furthermore, Foundry Networks offered free installation of all the Foundry Network products offered in the quote. The IT Network Operations Manager responded to Foundry Network's Regional Sales Manager with some questions on the quote provided. The Foundry Networks Regional Sales Manager responded by asking if they could set up a meeting to discuss the City's network requirements.</p>
May 13, 2003 May 16, 2003	<p>E-mail from the IT Network Operations Manager to a Cisco Major Account Manager, a Cisco Systems Engineer, a DVBE TECH Account Manager, an IT Information Systems Analyst, and the IT Telecom Specialist which requested a quote for network equipment for the new</p>

<u>Date</u>	<u>Event</u>
	Civic Center and a “network equipment list and quote for the VoIP solution that will satisfy 2000 stations and 2700 lines.” In a follow-up message a DVBE TECH Account Manager requested help with the VoIP configuration from the Cisco Major Account Manager and Cisco Systems Engineer. A DVBE TECH Account Manager sent an additional e-mail to the IT Network Operations Manager, a Cisco Major Account Manager, a Cisco Systems Engineer, an IT Information Systems Analyst, the IT Telecom Specialist, an IT Supervising Applications Analyst, and a DVBE TECH Business Development employee which stated that, “We’re working on several config alternatives, and attempting to get approvals on aggressive pricing; we want to present our best and final offer.”
May 19, 2003	E-mail from a Cisco Systems Engineer to the IT Network Operations Manager, a Cisco Major Account Manager, and a DVBE TECH Business Development employee regarding a question “based on the last Bill of Materials (BOM) submitted” to the City by a DVBE TECH Account Manager. In a follow-up e-mail from a DVBE TECH Business Development employee, a Cisco Major Account Manager, a Cisco Systems Engineer, and a DVBE TECH Account Manager with a quote attached for the new Civic Center project. The IT Network Operations Manager replied to the DVBE TECH Business Development employee, a Cisco Systems Engineer, a Cisco Major Account Manager, and a DVBE TECH Account Manager asking if the “data network AND IP Telephony solution for the New Civic Center ...” was included in the quote provided. A Cisco Major Account Manager responded that the solution included voice/data but not installation services.
May 20-21, 2003	The IT Network Operations Manager responded to the DVBE TECH Business Development employee, a Cisco Major Account Manager, a Cisco Systems Engineer, and a DVBE TECH Account Manager asking if the quote provided for the IP Telephony solution had the necessary redundancy built into it. The Cisco Systems Engineer responded to the IT Network Operations Manager, a DVBE TECH Business Development employee, a Cisco Major Account Manager, and a DVBE TECH Account Manager indicating that the solution did have the built in redundancy because “we have selected the Catalyst 6513 switches.”
January 5-6, 2004	E-mail message from a Cisco Major Account Manager to an IT Supervising Applications Analyst, and a Cisco Systems Engineer which followed-up on the timeline for the new Civic Center project and RFP. An IT Supervising Applications Analyst responded to a Cisco Major Account Manager and a Cisco Systems Engineer asking them to re-send the final BOM and Network design which would have all the changes incorporated. A Cisco Systems Engineer responded to an IT Supervising Applications Analyst and Cisco’s Major Account Manager with the updated configurations and Visio diagram for the Civic Center.
January 7, 2004	E-mail from K/C Future Planning, Inc., a consultant, to an IT Supervising Applications Analyst with details on the design intent of two rooms.
January 9, 2004	City enters into contract with The Application Group.

January 12, 2004	E-mail message from the IT Network Operations Manager to an IT Information Systems Analyst and an IT Supervising Applications Analyst, asking for any recommendations for a network design contractor. An additional message from the IT Network Operations Manager to a DVBE TECH Account Manager stated, "I would like to know if you could recommend a contractor, either firm or individual, who could do a network design for the new civic center and also draft that into an RFP? ... I am looking for your professional recommendation without sales input, if possible." A DVBE TECH Account Manager responded to the IT Network Operations Manager and an IT Information Systems Analyst, recommending a network design contractor.
January 15, 2004 January 20, 2004	E-mail from a Cisco Major Account Manager to the IT E-Government Program Manager, an IT Supervising Applications Analyst, the IT Network Operations Manager, a Cisco Systems Engineer, and the Deputy CIO regarding an RFP meeting. Cisco's Major Account Manager responded in a later e-mail to the IT E-Government Program Manager, a Cisco System Engineer, and a Systems Engineer Manager to confirm the RFP meeting and indicated she had "several [RFP] samples ... and will send them over to you later tonight."
January 15, 2004 January 20, 2004	E-mail from the IT Telecom Specialist to the Deputy CIO, the IT E-Government Program Manager, a Cisco Major Account Manager, and an IT Communications Technician with an attached "list of requirements for the call center application for NCC." Cisco's Major Account Manager responded to the IT Telecom Specialist, the Deputy CIO, the IT E-Government Program Manager, and an IT Communications Technician stating "What I will need before I can put together the list of hardware and software recommended is the number of simultaneous agents that will be logged onto the system."
January 20, 2004	E-mail from the IT E-Government Program Manager to an IT Supervising Applications Analyst, the IT Network Operations Manager, the Deputy CIO, a Cisco Major Account Manager, and a Cisco Systems Engineer to set up a meeting with Cisco regarding the RFP. Cisco's Major Account Manager responded to the IT E-Government Program Manager, a Systems Engineer Manager, and a Cisco Systems Engineer with attachments of some sample RFPs "that will give us a good starting point."
January 21, 2004	E-mail from the Denver Office of Information Technology Network Services Manager to the IT E-Government Program Manager with an attached copy of an RFP looking for a solution for either VoIP or PBX for comparison purposes.
January 22, 2004	E-mail from an IT Supervising Applications Analyst to the IT E-Government Program Manager and the IT Network Operations Manager which stated "Since we have not made a recommendation to the Information Technology Planning Board to standardize telephone services on Cisco Voice over IP products identifying what type of RFP we will have to submit will be very important. The three different types of Telephone Services/Network RFPs that need to be considered and/or

	<p>eliminated appear to be: RFP for any telephone service provider, analog or digital, RFP for Voice over IP telephone service providers, RFP for Cisco based Voice over IP based service providers. From the City's perspective the first provides the most information and justification, which should also validate our early estimates of cost savings. The second will eliminate other Voice over IP telephone service vendors from challenging why we limited the proposals to Cisco based IP telephone services. The Third is the most open to challenge since we do not have a City standard on Cisco based Voice over Telephone services. What ever commitments we may receive from GS may be revoked if pressure from vendors and/or the City Council occurs during the process. From our timeline we [sic] it appears we only have enough time for one RFP and if the RFP is pulled and/or not approved by City Council we will not be able to implement network and telephone services for the scheduled opening. I would recommend that we recommend to the Information Technology Planning Board the adoption of Cisco based Voice over IP. I believe we can provide enough documentation for the Information Technology Planning Board to accept our recommendation. Once Cisco based Voice over IP is a City standard then we can proceed with a Cisco based only RFP. If the Planning Board does not except [sic] our recommendation then it would be doubtful that we could have pushed this solution through the City process (including the City Council) successfully."</p>
<p>January 22, 2004 January 26, 2004</p>	<p>E-mail from the IT Network Operations Manager to two IT Supervising Applications Analysts, the IT E-Government Program Manager, the Deputy CIO, a Cisco Major Account Manager, and a Cisco Systems Engineer asking for an "updated Excel workbook with all the B[O]Ms for all the module for the new Civic Center?" Cisco's Major Account Manager responded to the IT Network Operations Manager, two IT Supervising Applications Analysts, the IT E-Government Program Manager, the Deputy CIO, and a Cisco Systems Engineer stating "The revised bill of materials with the items removed for the pilot project back in and the changes from our last meeting will be completed mid-week."</p>
<p>January 23, 2004 January 26, 2004</p>	<p>E-mail from an IT Supervising Applications Analyst to a Cisco Systems Engineer, a Cisco Major Account Manager, the IT Network Operations Manager, and the IT E-Government Program Manager verifying that Cisco's IP phones do not directly mount to the wall; rather the phones must be mounted with an adaptor. The IT Supervising Applications Analyst then asked Cisco to add the adapters to the BOM. A Cisco Major Account Manager responded to the IT Supervising Applications Analyst, a Cisco Systems Engineer, the IT Network Operations Manager, and the IT E-Government Program Manager indicating that they would add them to the BOM.</p>
<p>February 4, 2004</p>	<p>City enters into contract with TMG Consulting, Inc.</p>
<p>February 17, 2004</p>	<p>E-mail from a Cisco Major Account Manager to the IT E-Government Program Manager, the IT Network Operations Manager, two IT Supervising Applications Analysts, and a Cisco Systems Engineer asking to set up a meeting to review the final BOM for the NCC.</p>

February 20, 2004	E-mail from a Cisco Systems Engineer to the IT Network Operations Manager, the IT E-Government Program Manager, an IT Supervising Applications Analyst, and a Cisco Major Account Manager with attached documents related to Call Manager features 4.0, Call Manager features 3.3, IPT security, and Cisco IP Telephony Security. The Cisco Systems Engineer stated that “Our Civic Center solution is pretty robust as we have followed the SAFE security architecture, integrated security features in the Catalyst switches with best practices deployed ..., you should feel confident that IP Telephony and the underlying data network are secure.”
February 22, 2004	E-mail from a Cisco Systems Engineer to the IT E-Government Program Manager and two Supervising Applications Analyst with attached documents – final BOM and Vision diagram for the NCC. The Cisco Systems Engineer states, “Please review the files and let me know if you have any questions. I am still working on the new ‘one page’ Visio diagram and will send that to you by Monday evening.” A diagram was included as “Attachment G” of the RFP.
February 23, 2004 February 25, 2004	E-mail from the IT Network Operations Manager to a Cisco Major Account Manager, a Cisco Systems Engineer, the Deputy CIO, and the IT E-Government Program Manager regarding Cisco training courses recommended for an “individual who is Cisco savvy on our current network environment and moving to support the new Cisco technologies proposed for the New Civic Center.” Cisco’s Major Account Manager responded to a Cisco Systems Engineer, the IT Network Operations Manager, the Deputy CIO, and the IT E-Government Program Manager, that she will “put together the recommended training.” Also, attached to the e-mail was a revised list of partners and their certifications. The attached recommended partner list included Fusion Storm, AMS.net, NextiraOne, SBC, and Unisys. Cisco’s Major Account Manager sent an additional e-mail to the IT Network Operations Manager, the Deputy CIO, the IT E-Government Program Manager, a Cisco Systems Engineer, and the IT Telecom Specialist with a list of Cisco-provided trainings that she would recommend for the team. Cisco’s Major Account Manager specifically mentioned “Telephony 101”, “Day in the life of the Telecom Manager – the group that knows the voice but needs basic data training.” Furthermore, Cisco’s Major Account Manager states that “For the Cisco Partner training – the city can purchase a block of training credits and then use them as you see fit... We can work on a course curriculum once the skill sets have been identified.” Cisco Major Account Manager indicates that she will send the quote for training credits to process. The IT Network Operations Manager responds to Cisco’s Major Account Manager, the Deputy CIO, the IT E-Government Program Manager, a Cisco Systems Engineer, the IT Telecom Specialist, an IT Supervising Applications Analyst, an IT Information Systems Analyst, and three IT Enterprise Network Engineers describing who he and other IT staff would like to take the Telephony 101 class and when. Furthermore, the IT Network Operations Manager inquired as to whether Cisco provides similar classes for the switching, security, and network management components that are proposed for the new Civic center. There are seven additional e-mail messages among City

	staff, a Cisco Systems Engineer, and Cisco's Major Account Manager dated March 1, 2004 through March 10, 2004 to schedule and confirm timing of these trainings.
February 23, 2004	E-mail from the TMG Consultant to the Deputy CIO and The Application Group Consultant raising some issues to review with the team. Specifically, the TMG consultant states that he spoke with The Application Group Consultant "about the Hardware requirements your team has. We [are] not sure we need to include it in the RFP. Usually the vendor recommends a hardware configuration to meet our requirements."
February 23, 2004 February 26, 2004	E-mail messages between The Application Group Consultant to Cisco's Major Account Manager and the TMG Consultant scheduling a Cisco IP communications demonstration at Cisco's demo lab and inquiring as to whether there is a type of features & functionality checklist for release 4.0.
February 26, 2004	E-mail from a Purchasing Agent to the Deputy CIO and the TMG Consultant outlining some initial concerns over the RFP. Specifically, the Purchasing Agent addresses concerns regarding the aggressive timeline in the RFP and the minimum requirements in the RFP specifying that proposers must be Cisco partners with service centers within 30 miles of the City of San Jose. The Purchasing Agent was also concerned that the Cisco partner requirement effectively limited all proposers to a Cisco solution. Furthermore, the Purchasing Agent states that he agrees with the TMG Consultant that "an equipment list in the RFP? What would the solution be that we say we're looking for? In addition, this appears to be for Cisco equipment. If we limit this to a Cisco solution, then we might have to deal with non-Cisco suppliers that claim they could have met our requirement but were not given the opportunity." The Purchasing Agent does note that if the City has a standard, then his concerns over the Cisco partner requirement and inclusion of the equipment list in the RFP are not issues. However, the Purchasing Manager does state, "If we limit this to a Cisco solution and have a list of equipment, I'm not sure it's an RFP ..."
February 26, 2004	E-mail from a Cisco Systems Engineer to the IT Network Operations Manager, the IT E-Government Program Manager, two IT Supervising Applications Analysts, the IT Telecom Specialist, a Cisco Major Account Manager, and a Systems Engineer Manager regarding the Civic Center – one page diagram. The e-mail states, "Here is the one page diagram that I showed you the other day. Please review it and upon your approval, I will get several copies laminated and bring them to your office soon."
March 3, 2004	E-mail from a Cisco Systems Engineer to the IT Network Operations Manager, the IT E-Government Program Manager, the IT Telecom Specialist, the Deputy CIO, a Cisco Major Account Manager, and a Systems Engineer Manager stating, "Attached is a document that has the IP Telephony and Security requirements that were requested by [the IT Network Operations Manager] (for inclusion in the RFP). Please review it and let me know if you have any questions."

March 10-11, 2004	E-mail from the IT Network Operations Manager to a Cisco Systems Engineer and a Cisco Major Account Manager requesting information on an estimated implementation plan, including man hours and days needed. Cisco's Major Account Manager responds to the IT Network Operations Manager and a Cisco Systems Engineer stating, "My main point of this message is that – the start of the initial deployment data is not contingent on the NOC being completed..." Furthermore, the e-mail states, "One other idea I can offer to help you through your selection process to provide benchmarks is – once the RFP is out – I will send it to my internal professional services group and have them come up with a statement of work – just as if we were bidding on your project directly."
March 15, 2004	Converged Network for the New Civic Center RFP (RFP 03-04-08) Released.
March 16, 2004	E-mail from the Deputy CIO to a Cisco Major Account Manager with Converged Network RFP attached.
March 16, 2004	E-mail from the IT E-Government Program Manager to a Cisco Major Account Manager and the IT Network Operations Manager indicating that "Tomorrow we need to report the additional costs of an accelerated implementation plan where the NOC is not available until February." Furthermore, the IT E-Government Program Manager asked that Cisco proceed with the professional services group's review of the RFP internal analysis. Cisco's Major Account Manager responds to the IT E-Government Program Manager and the IT Network Operations Manager indicating that she has already sent the RFP to the professional services group for them to review.
March 18, 2004	E-mail from a Cisco Major Account Manager to the Deputy CIO. The subject of this e-mail is RE: Nortel and the text states: "FYI – I guess they are threatening a protest ... but you knew that same [sic] of this would be coming up – just keeping you in the loop of what I am hearing on the streets... do you need anything from me to help combat this moving forward?" The City's Deputy CIO responds to this e-mail to Cisco's Major Account Manager with "Any word on who they plan to protest to?" In response to this e-mail, Cisco's Major Account Manager responds to the Deputy CIO with "No it's just threats right now -- will keep you posted..."
March 18, 2004	E-mail from a Cisco Major Account Manager to the Deputy CIO regarding potential vendors' questions on the RFP. Cisco's Major Account Manager states: "Attached is what we came up with on the first couple of pass through [sic] of the questions ... I hope this helps – When you get the questions specifically from the partners – please send us over a copy so we can assist with the answers if you'd like..."
March 22, 2004	E-mails between the CIO, a Cisco Major Account Manager, and a Cisco Bay Area Region Manager, setting up a lunch.
March 22, 2004	Written questions/requests for clarification due for the Converged Network for the New Civic Center RFP.

March 23, 2004	E-mail between the Deputy CIO and a Cisco Major Account Manager setting up a lunch meeting to discuss the “RFP process and responses, [and an] update in general (PD, Council, Partners)...”
March 22, 2004 April 1, 2004	E-mail message from a Cisco Major Account Manager to the Deputy CIO asking for a bio or job description so that the Cisco Systems Engineer Manager is prepared for the meeting on April 5 th . The Deputy CIO responds ten days later to Cisco’s Major Account Manager with her biography. Cisco’s Major Account Manager responds to the Deputy CIO thanking her for the biography and stating that she wanted “...our VP to be prepared on Monday for our call.”
March 23, 2004	E-mail from the Deputy CIO to a Cisco Major Account Manager regarding the potential vendors’ questions on the RFP. The Deputy CIO states, “Here is [sic] all the questions that have been submitted by the vendors. Can you take a look at them and give me a call so we can strategize as to what answers you can assist with? We need to get the answers out tomorrow.” Cisco’s Major Account Manager responded to the Deputy CIO stating, “I will print them out – review and call you mid-morning to discuss – I have also sent them to my extend[ed] team mates [sic] as well to gather all the resources that will be needed ...”
March 23, 2004	E-mail from the Deputy CIO to the IT E-Government Program Manager, the TMG Consultant, The Application Group Consultant, and the CIO regarding the potential vendors’ questions on the RFP and stating that, “We will need to start gathering answers to these questions asap. The responses are due out to the vendors tomorrow. I have forwarded them to [Cisco’s Major Account Manager] and have asked her to call me.” Vendors’ questions were attached to this e-mail.
March 23, 2004	E-mail from the IT E-Government Program Manager to a Cisco Major Account Manager, a Cisco Systems Engineer, and the Deputy CIO regarding initial responses to vendors’ questions stating: “Here are the responses we have up to this point. [The Deputy CIO] asked to send them to you. We are planning to get together later today to go over some [of] the issues.” Cisco’s Major Account Manager responds to the IT E-Government Program Manager, the Deputy CIO, a Cisco Systems Engineer, and a Cisco Systems Engineer Manager stating: “Thanks for sending this over – I just left you a voicemail – [Cisco Systems Engineer Manager] and I would be available to review the responses and questions with you later this afternoon if that works for you ...”
March 23, 2004	E-mail from a Cisco Major Account Manager to the TMG Consultant, a Cisco Systems Engineer, and a Cisco Systems Engineer Manager summarizing the items Cisco will send to the City’s consultant and specifically states, “Last items were the information and requirements provided by the city that we used to architect our complete converged network design...”

March 23, 2004 March 29, 2004	E-mail from an IT Supervising Applications Analyst to a Cisco Major Account Manager and the IT E-Government Program Manager regarding assistive listening devices for IP phones. Cisco's Major Account Manager responded that a third party device called a "loaner" personal amplifier with headset is provided to people in the audience who have hearing loss.
March 24, 2004	E-mail message from the TMG Consultant to the CIO, the Deputy CIO, and the IT E-Government Program Manager regarding RFP question responses. Specifically, the TMG Consultant stated, "I also just received Cisco's responses to my questions so I will be incorporating them." There is an additional e-mail from the TMG Consultant to the IT E-Government Program Manager and the IT Network Operations Manager stating that he is still waiting for some clarification from Cisco on the final answers.
March 24, 2004	E-mail from a Cisco Systems Engineer to a Cisco Major Account Manager, the TMG Consultant, a Systems Engineer Manager, the IT Network Operations Manager, and the IT E-Government Program Manager regarding potential vendors' questions on the RFP which stated, "Here is the suggested text that can be used in response to vendor questions about Cisco SAFE security architecture: ..." Text was included in the e-mail regarding Cisco SAFE security architecture.
March 26, 2004	Converged Network for the New Civic Center RFP Mandatory Pre-Proposal Conference.
March 26, 2004 March 29, 2004	E-mail from an IT Communications Technician to SBC's Senior Account Manager, the IT Telecom Specialist, the IT E-Government Program Manager, and the Deputy CIO regarding "Questions from CSJ VoIP Bidders Conference" which stated, "In order to provide potential bidders a more level playing field, please provide the CSJ with information regarding the type of equipment and interfaces for the city's Centrex and voice mail services." In a follow-up e-mail from an IT Communications Technician to SBC's Senior Account Manager, the IT Telecom Specialist, the IT E-Government Program Manager, and the Deputy CIO, the City requested the information ASAP as they have to respond to the bidders' questions by Monday, 3/29/04. SBC's Sales Manager responded to an IT Communications Technician with an attached spreadsheet illustrating the type of equipment and interfaces for the City's Centrex and voice mail services.
March 26, 2004	E-mail from the CIO to a Cisco Bay Area Region Manager which stated, "I need your help. The chair of the Small Business Commission ... is likely to complain to Council Members that the network infrastructure project needs to be "chunked" up in order to allow small businesses to provide a proposal on some portion of the overall project. I know I can say that the City is looking for a complete integrated solution (end-to-end) and must minimize the risk of multiple vendors pointing fingers at each other when the telephone doesn't have dial tone or the network doesn't work, but I don't think that will be good enough for the Council. Can I get your help in answering the question, in the case it comes up?" Cisco's Bay Area Region Manager responded to the CIO, including

	<p>other Cisco employees, by stating that, “most similar RFP’s will ask that the vendors include local business partners and run a certain amount of the project through them. (5-15%). Depending on the project that can be easy or hard to do. It seems that talking with the chair directly may make sense. Typically, small/minority vendors do some small pieces. Most Small Business Commissions have a list of registered San Jose small businesses that would qualify – does yours? Then me [sic] might be able to look at it, contact a few, see how they could play, and then either connect them with the bigger partners or let the big guys do that themselves. How do you want me to proceed?” The CIO responded to Cisco’s Bay Area Region Manager with, “We didn’t specify anything in the RFP re: local business partners or a preference for such partners ... We have already talked with the chair, and I’m sure will do so again before all is said and done, urging him to encourage other small and local businesses to identify bigger partners from those who have downloaded the RFP... This appears to be an issue of opinion regarding “entitlement”, hence the need to be able to explain the technical difficulties rather than challenging the particular opinion.”</p>
March 29 – April 5, 2004	<p>E-mail from the Chairman for the Small Business Development Commission to San Jose City Council members and the Director of General Services discussing concerns over the Converged Network for the New Civic Center RFP as it relates to small and local businesses. The CIO responded to a Cisco Major Account Manager, a Cisco Bay Area Region Representative, and the Deputy CIO and asked to “discuss the implications of this on the RFP process and outcomes.” Cisco’s Major Account Manager responded to the Deputy CIO to see if the City could obtain a list from the chairman of the small and local requirements as well as a list of the businesses registered with the chairman. Cisco’s Major Account Manager proceeded to explain that if such a list could be obtained Cisco would compare it against their list of Cisco Registered Partners. In a subsequent e-mail Cisco’s Major Account Manager responded to the CIO, Cisco’s Bay Area Region Manager, and the Deputy CIO stating that the Major Account Manager and City’s Deputy CIO were working together on the list of small and local businesses that qualify in the area. The CIO followed up with Cisco’s Major Account Manager and the Deputy CIO and requested that she obtain the names of the vendors who attended the bidders’ conference that qualified as “...’local’ and if there are any ‘small’ vendors who might qualify as sub-contractors.” In addition, the CIO requested the “...timeline for this RFP in the case the Council asks what the timeline implication would be to send out an addendum and extend the timeline. And any thing [sic] else you might think of.” The Deputy CIO responded to Cisco’s Major Account Manager and the CIO and provided Cisco with two addendums that had been issued on the RFP, one from the written questions submitted and the other from the conference which lists the attendees. Cisco’s Major Account Manager later followed up with the Deputy CIO and the CIO in an e-mail with an attachment of “the status of the partners that attended the bidders conference and also a few of the small local partners with some Cisco clarifications. There are many more – 1office sites – ‘Cisco Resellers’ – but that could be someone out of their</p>

	garage selling our equipment. Once we know for sure the qualifications of small/local business I should be able to supply you more information.” An additional e-mail from Cisco’s Major Account Manager to the CIO and the Deputy CIO stated, “What additional information is need for the 13 th ? – 1. List of partner status and small business information attached. 2. Our legal department will supply you a couple of paragraphs explaining our typical engagement with the partners. 3. Should have later today who is responding to the RFP – right now I know: Norstan, SBC, NextiraOne, Unysis/Spanlink combination, NexusIS, IBM – verifying for sure, FusionStorm -??, NEC - ??, HP??. Channel team is engaged with Verizon – do not know of the other smaller partners. Please let me know – want to make sure you are 100% prepared for the 13 th ...”
March 29, 2004	E-mail from a Cisco Major Account Manager to the IT Network Operations Manager, the IT E-Government Program Manager, an IT Supervising Applications Analyst, and a Cisco Systems Engineer to a follow up on any “outstanding items we owe you.” The e-mail continued with “The main one I have on my plate is to provide you a SOW [statement of work] from the RFP and BOM as if Cisco would be responding direct to your request for services – we will not provide answer to your questions – but I can provide a SOW with or without pricing for your reference ... please let me know...”
March 30, 2004 April 1, 2004	E-mail from the IT Network Operations Manager to a Cisco Major Account Manager, a Cisco Systems Engineer, the IT E-Government Program Manager, and two IT Supervising Applications Analysts which indicated that he was waiting for information on additional training staff could get that was similar to what Cisco provided earlier as well as recommendations for formal training. A Cisco Systems Engineer responded to the IT Network Operations Manager, Cisco’s Major Account Manager, the IT E-Government Program Manager, and two IT Supervising Applications Analysts indicating that he would be arranging for the Business Unit Technical staff to visit the City team and present the features and capabilities of different parts of the Civic Center design (i.e. Service Blades, Network Management, Catalyst Platform, Security Solutions, etc.). The IT Network Operations Manager responded to a Cisco Systems Engineer, Cisco’s Major Account Manager, the IT E-Government Program Manager, and two IT Supervising Applications Analysts, and asked if the Cisco Business Unit could discuss with City staff how the technology and equipment would be deployed and work in the New Civic Center.
April 1, 2004 April 8-9, 2004	E-mail from a Cisco Major Account Manager to two IT Supervising Applications Analysts, the IT Network Operations Manager, the IT E-Government Program Manager, the IT Telecom Specialist, a Cisco Systems Engineer, and the Deputy CIO which stated that “We can arrange a 1:1 meeting with the Product Manager and the Technical Engineer who supports the 6500 platforms. This meeting would be customized to your specific requirements and configuration...” The Deputy CIO responded to Cisco’s Major Account Manager, two IT Supervising Applications Analysts, the IT Network Operations

	<p>Manager, the IT E-Government Program Manager, the IT Telecom Specialist, and a Cisco Systems Engineer and indicated that she would like everyone to attend this meeting. Cisco's Major Account Manager confirmed with the Deputy CIO, the IT Network Operations Manager, the IT E-Government Program Manager, the IT Telecom Specialist, two IT Supervising Applications Analysts, and a Cisco Systems Engineer that the meeting will take place in Pleasanton and the topic of discussion is the "720 Supervisor Engine for the 6513 Catalyst Switch and it's [sic] roadmap."</p>
April 2, 2004	<p>E-mail from the CIO to a Cisco Major Account Manager and the Deputy CIO which stated "We have other complications, though, and that is that one vendor has requested 3-4 weeks additional time and another an additional week. So, we'll be dealing with that issue today as well. Also, one of the vendors has complained to General Services that Cisco has had conversations with some of their partners before the RFP went out, that may end up being a problem for us if they protest the RFP process. We can chat more about that today as well."</p>
April 6, 2004	<p>E-mail from a Cisco Major Account Manager to the Deputy CIO which stated "Just a quick message to confirm our meeting tomorrow ... the items on my agenda to discuss are: 1. Update critical dates on NCC timelines (guess what I heard today – our friends from Verizon are not bidding – even when you gave them an extra week) 2. Preparation for next Tuesday's council meeting (small/local business) 3. Strategy on educating the Council members before the June meeting 4. Call center project head by "Roger Picklen"?? Finance dept – Amnesty project 5. Preparation for PD briefing – April 19th – agenda – (include contacts from FD?)"</p>
April 6, 2004	<p>E-mail from a Cisco Major Account Manager to the CIO, a Cisco Transformation Principal, and a Cisco Customer Solutions Manager to confirm a meeting for April 7th. During the first hour, discussions were scheduled to revolve around "deployment/program manager for the NCC, engagement process for the IT master plan, any other opportunity to discuss their involvement (One Voice, LiveLink).</p>
April 7, 2004	<p>E-mail from a City Supervising Applications Analyst to a Cisco Major Account Manager regarding VoIP billing management.</p>
April 7, 2004	<p>E-mail from a Cisco Major Account Manager to the Deputy CIO and the CIO. E-mail was a forwarded message from a Cisco Channel Account Manager stating: "Team, I wanted to take a brief minute to provide an update on where things stand with Verizon. As of today, Verizon plans to "no-bid" the City of San Jose RFP. I have confirm[ed] with the ILEC National Channels team assigned to Verizon that the "threats" made to protest based on unfair access to the manufacturer "Cisco" in this case are without merit. Verizon's Management Team does not endorse these allegations and has confirmed that this is an isolated incident coming from the local Account Team. Verizon had taken necessary action to address the local Account Team directly on this issue and considers this matter closed. If we receive feedback from our contacts at the City of San Jose that this behavior continues to persist please advise either myself or Kevin Whelan ASAP!"</p>

April 9, 2004	E-mail from a Cisco Major Account Manager to the CIO which stated “Per our discussion earlier this week – attached is the letter explaining our partner engagement process. Please let me know if you have any questions or changes needed ...” The above-mentioned attached letter states, “This letter is in response to City of San Jose’s inquiry as to Cisco’s channel partner engagement model with respect to third party RFP responses. As a manufacturer, Cisco generally provides objective assistance to authorized Cisco resellers to assist the reseller in preparing their response to an RFP. This assistance takes the form of informational responses to partner questions, and is provided on an as-requested basis to the partner seeking such assistance. With respect to Cisco’s involvement in assisting potential respondents to the RFP titled “Converged Network for the New Civic Center” RFP-03-04-08 released on 3-15-04 (“RPF-03-04-08”), our involvement was consistent with our general engagement model.. It should be noted that prior to the posting RFP, Cisco did not have prior knowledge of the city of San Jose’s specific requirements and specifications of the above mentioned project.”
April 9, 2004	Original Due Date for Converged Network for the New Civic Center RFP Technical Proposals.
April 16, 2004	Extended Due Date for Converged Network for the New Civic Center RFP Technical Proposals. Six proposals received for Converged Network.
April 17, 2004 April 20, 2004	E-mail message from the IT E-Government Program Manager to a Cisco Systems Engineer and the IT Network Operations Manager which inquired into the features of Call Manager 4.0, specifically if Call Manager 4.0 would support AD 2003? A Cisco Systems Engineer responded to the IT E-Government Program Manager, the IT Network Operations Manager, a Cisco Systems Engineer Manager, and a Cisco Major Account Manager indicating that AD2003 would “be supported on CallManager 4.0 by end of April 2004.”
April 20, 2004	City of San Jose, RFP 03-04-08 Information Bulletin – Correction sent to vendors.
April 27, 2004	E-mail from the IT E-Government Program Manager to the TMG Consultant, The Application Group Consultant, and the IT Network Operations Manager regarding changes to the specifications. Specifically, the IT E-Government Program Manager stated “since the BOM in the RFP was released there are a few more pieces of equipment (Ethernet switches) that need to be added because of changes in the cabling design. Initially the locations were thought to be within 300’, however it was found to be greater than that. Bottom line is we will need additional (probably smaller) switches to pick up small areas of several floors.”
April 28, 2004	Vendors were notified by e-mail that they were selected to advance to Phase 3, or Final Technical Evaluation process, which includes oral interviews.
April 28, 2004	E-mail from the IT Network Operations Manager to a Cisco Systems Engineer, the IT E-Government Program Manager, and an IT Supervising Applications Analyst regarding questions about re-

	engineering NCC network design. The IT Network Operations Manager stated that the City will need to provide connectivity to six new locations within the new Civic Center and listed recommendations for the Cisco Systems Engineer to consider in re-engineering his network design.
May 14, 2004	Final technical specifications were sent to Proposers, along with Cost Proposal Forms.
May 14, 2004	E-mail from the IT E-Government Program Manager to the Deputy CIO which stated that SBC had asked for a five-day extension and that he wanted to discuss the implications of this.
May 17, 2004	Final clarifications and cost proposals received from Proposers.
May 19, 2004	E-mail from the IT Network Operations Manager to a Cisco Systems Engineer, a Cisco Major Account Manager, the IT E-Government Program Manager, and an IT Communications Technician which questioned how staff and the public would dial 911 at the new City Hall. A Cisco Systems Engineer responded to the IT Network Operations Manager, a Cisco Major Account Manager, the IT E-Government Program Manager, and an IT Communications Technician by explaining that it is dependent on the Dial Plans and that the dial plan can be configured to recognize both 911 and 9911 emergency route patterns.
June 2, 2004	Reference checks completed for the final three vendors.
June 7, 2004	Financial Viability Statements completed for the final three vendors.
June 9, 2004	E-mail message from The Application Group Consultant to a Purchasing Agent, the CIO, an IT Administrative Officer, the IT E-Government Program Manager, and the Deputy CIO indicating that the CIO “said to pull the SmartNet out of the cost as it is going to go into the operations budget.”
June 10, 2004	E-mail from The Application Group Consultant to the CIO and the Deputy CIO regarding the VoIP Memo to Council. In the e-mail the Consultant asked if some material on SBC’s weaknesses should be added to the memo. In a follow-up e-mail from the CIO to the Deputy CIO and The Application Group Consultant, the CIO indicated that information on SBC’s weaknesses should be added to the memo.
June 14, 2004	E-mail from The Application Group Consultant to the CIO, the Deputy CIO, and the IT E-Government Program Manager which recommended obtaining a Cisco project/program manager for the contract negotiation phase and a Cisco Technical Architect/Engineer to work with the City in troubleshooting.
June 16, 2004	Memo to Council from the CIO and the GSD Director regarding the Report on RFP for a Converged Network for the New City Hall.
June 18, 2004	SBC inquired to Purchasing as to the process and timeline for submitting a formal protest of the converged network RFP.
June 21, 2004	City Staff met with representatives from SBC to discuss questions and concerns that SBC had related to the converged network RFP.
June 21, 2004	SBC Sales Vice President sends a letter to the CIO and the GSD Director to express “SBC’s deep concern regarding the evaluation of responses to RFP No. 03-04-08 [Converged Network for the New Civic Center].”

June 22, 2004	Supplemental Memo to Council from the CIO and the GSD Director regarding the Report on RFP for a Converged Network for the New City Hall. Council directed the City Attorney to review the RFP Process. Council approved recommendation to move forward with negotiating a contract with Unisys.
June 28, 2004	SBC Legal Counsel sends letter to City Attorney protesting the approval to negotiate a contract with Unisys for the Converged Network for the New Civic Center.
June 28 - 29, 2004	E-mail from a Cisco Major Account Manager to the CIO regarding value engineering for the NCC project. Specifically, Cisco's Major Account Manager requested the "% target" that the City was trying to cut back by. The CIO responded to Cisco's Major Account Manager and the IT E-Government Program Manager stating that "Council set a goal of 15% savings."
June 29, 2004	Council directed the City Auditor to partner with the City Attorney in conducting a review of the RFP process.
June 29, 2004	E-mail message from the IT E-Government Program Manager to a Cisco Systems Engineer, and an IT Network Operations Manager regarding reliability statistics for equipment. The Cisco Systems Engineer responded to the IT E-Government Program Manager, the IT Network Operations Manager, and a Cisco Major Account Manager indicating that he was working on "high availability aspects..." and that he would be ready to talk about it in detail on Thursday morning.
July 1, 2004	Law firm of Rogers Joseph O'Donnell & Phillips, legal representatives of SBC, sends letter to City Attorney invoking a Public Records Act Request.
July 26, 2004	Law firm of Rogers Joseph O'Donnell & Phillips, legal representatives of SBC, sends letter to City Auditor regarding Comments on the Relative Costs of SBC and Unisys Proposals.
July 28, 2004	City Auditor receives phone message from Cisco Corporate Counsel stating "So when we finished our discussion last week, it was clear that you and your colleagues were concerned about the amount of communication between Cisco and the City while the bidders were responding to the RFP. And at that time I was taken aback and a bit surprised cause I had done this review and had not really seen too many, too much of that communication and too many e-mails but I went back to take a look at additional e-mail logs and I have now seen a number of communications between a [Cisco Major Account Manager] and the City during this time so I think I better understand the issue now. But most importantly, and the real reason I am calling, is one of those communications was an e-mail from a [Cisco Major Account Manager] to the [CIO] that attached a letter dated April 9 th addressed to the [CIO]. The letter is sort of two short paragraphs about Cisco's partner engagement model generally and the last sentence though says that on this particular RFP, Cisco did not have prior knowledge of the City's specific requirements for this project and clearly that sentence is not accurate as you probably realize if you've seen the letter. We had not seen it when we spoke last week. A [Cisco Major Account Manager] doesn't know why that sentence was in there. It looks like the letter

	itself was at the request of the City and so maybe the City knows, but in all event, even though this letter may have had little effect on the actual RFP process, the last sentence is not accurate and I wanted to bring that to your attention if you hadn't seen it before to clarify what, to my mind, is a misstatement that Cisco made to the City."
July 29, 2004	Law firm of Rogers Joseph O'Donnell & Phillips, legal representatives of SBC, sends letter to City Auditor regarding the Converged Network for the New City Hall, specifically the "Administrative and Maintenance" training.
August 3, 2004	Law firm of Rogers Joseph O'Donnell & Phillips, legal representatives of SBC, sends letter to the City Attorney and City Auditor regarding the Converged Network for new City Hall, specifically regarding SBC's comments on the evaluation process used by the City.